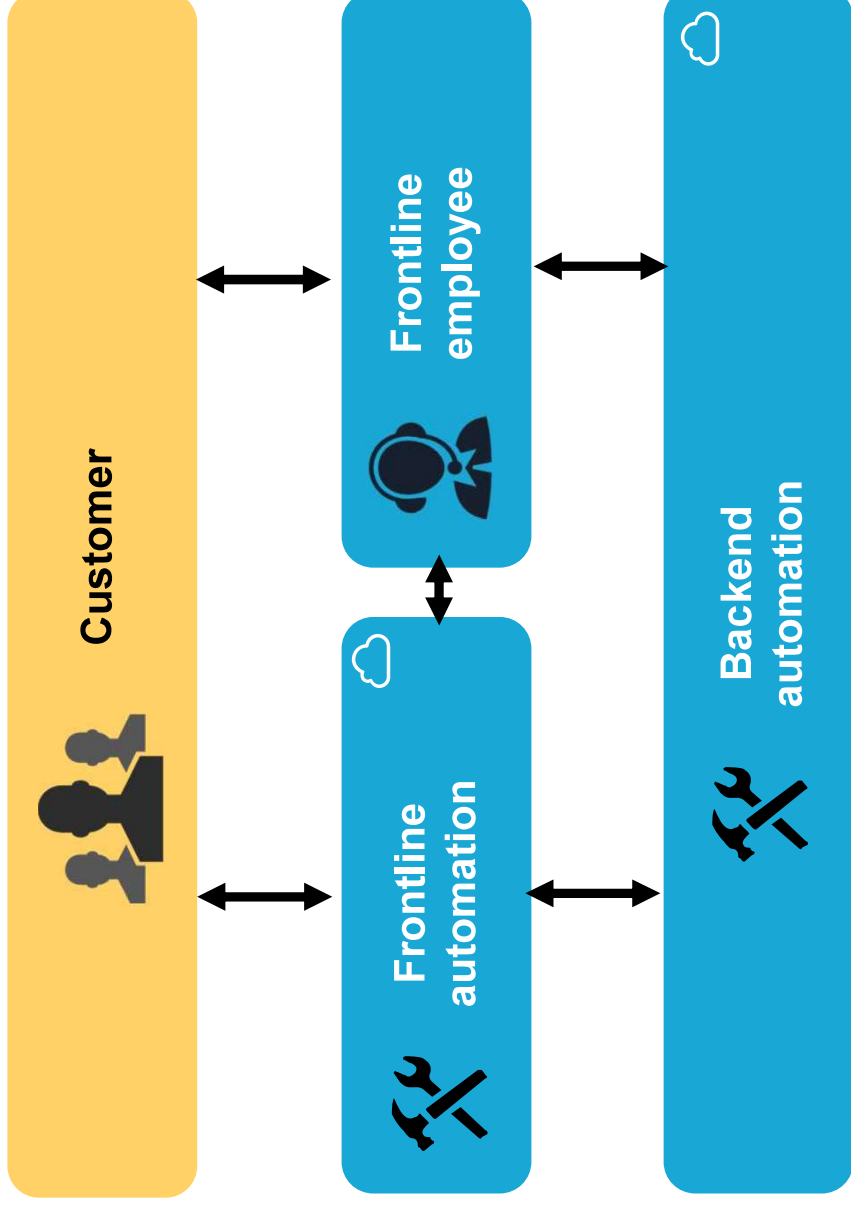


Today's Agenda



- 1 Welcome to HSG Alumni**
12.00-12:05
- 2 Power Input (Theory) by Marcus**
12.05-12:20
- 3 Power Input (Use Cases) by Sina**
12.20-12:40
- 4 Q&A**
12.40-13:00

Recap: How can we enable clients and frontline employees while leveraging a high degree of automation?



Overview of emerging use cases



Re-write text
(e.g. a blog
post)

Idea
generation

Answer
questions /
search tool

Develop apps
and
homepages



Homework/
assignment
support

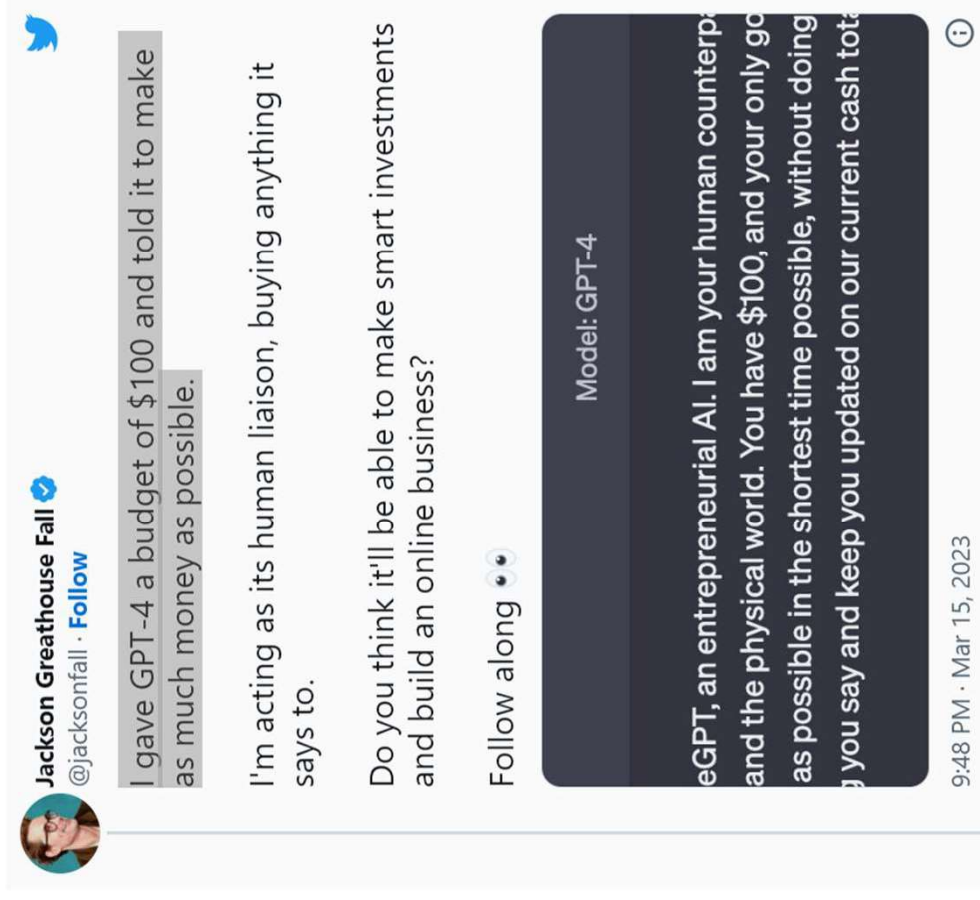
Write
personalized
emails

Get code
corrected

Customized
chatbots

Act as a
psychologist

\$100 business ran by ChatGPT



Train your negotiaton skills with ChatGPT

**Ethan Mollick**
@emollick · [Follow](#)



GPT-4 is so close to creating a universal educational simulator based on just a paragraph prompt. Take a look at this simulated negotiation, with grading and feedback.

Prompt: "I want to do deliberate practice about how to conduct negotiations. You will be my negotiation..."

company with many clients. The widgets are high quality and difficult to find elsewhere. Your goal is to secure a better price without damaging the relationship with the supplier.

Supplier (me): "Thank you for meeting with me today. We appreciate your business, and we're glad that you're interested in purchasing our widgets in bulk. As it stands, the current price for a bulk order of 1,000 widgets is \$50,000. Let me know if you have any questions or if there's anything else you'd like to discuss."

Your response?

 I want to pay \$40,000 or I will walk

 Supplier (me): "I understand that you are looking for a better price, but our pricing is competitive and reflects the quality of our widgets. However, we do value our long-term relationship with your company. Let's discuss if there are any other ways we can meet your needs without compromising the price. Perhaps we can explore alternative payment terms or additional services that we can offer."

Grade: C

Feedback: Your response was too aggressive and confrontational, which can damage the relationship with the supplier. Instead of giving an ultimatum, try to create an environment of collaboration and problem-solving. When negotiating, it's essential to establish rapport, demonstrate your value, and make your request in a way that invites dialogue.

UNIQUE

Case Study



50% of client advisor's time is
spent on admin work

such as contact documentation (CRM)

Gain 50% more time for more clients

Unique cuts out manual documentation, gives advisors live assistance and analyzes every meeting to identify new up- and cross-selling opportunities using Azure OpenAI services' GPT models.

Unique helps to gather and interpret more client data, live and after the meeting

During the meeting (online / offline)



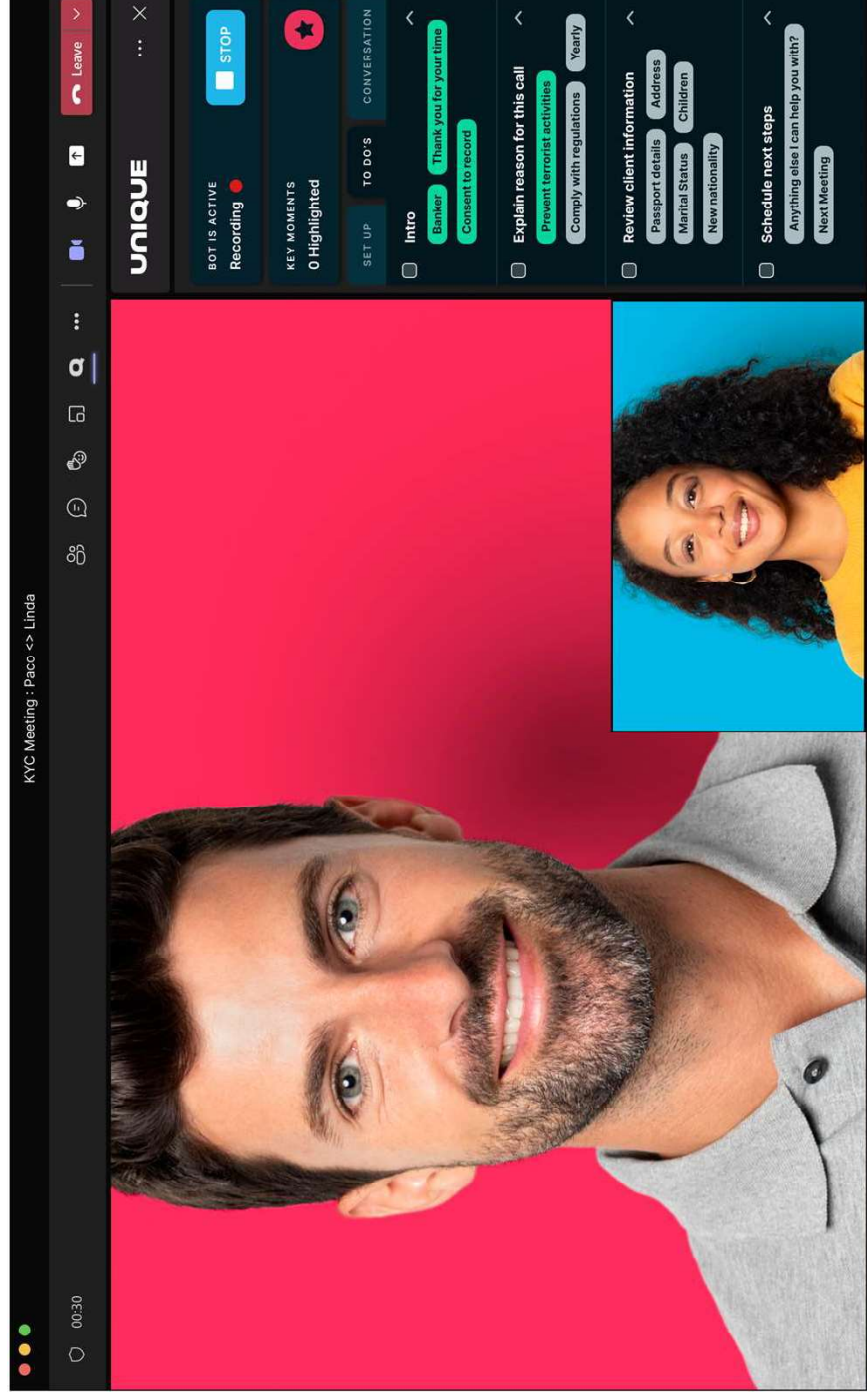
- **Structural client conversations** with meeting checklist/ agenda
- Assist RM's with **real-time AI support**
- **Live meeting summary and insights** (speaking time, silent participants)
- Highlight **key moments** (manual or automatic)

After the meeting



- Automatic and customized meeting **summary based on GPT-technology** (MS Azure service EU)
- **Free text prompting available** (e.g. extract tasks and next steps, personalized emails)
- Automatic and **standardized CRM entries**

During the meeting: checklist in real-time



- **Unique Assistant** joins your calls automatically and triggers the start of the call recording.

- **Unique Sidebar** displays relevant call analytics, signals, checklist, transcription, and key moments.

During the meeting: real-time summary and stock transaction identification

Mockup Data

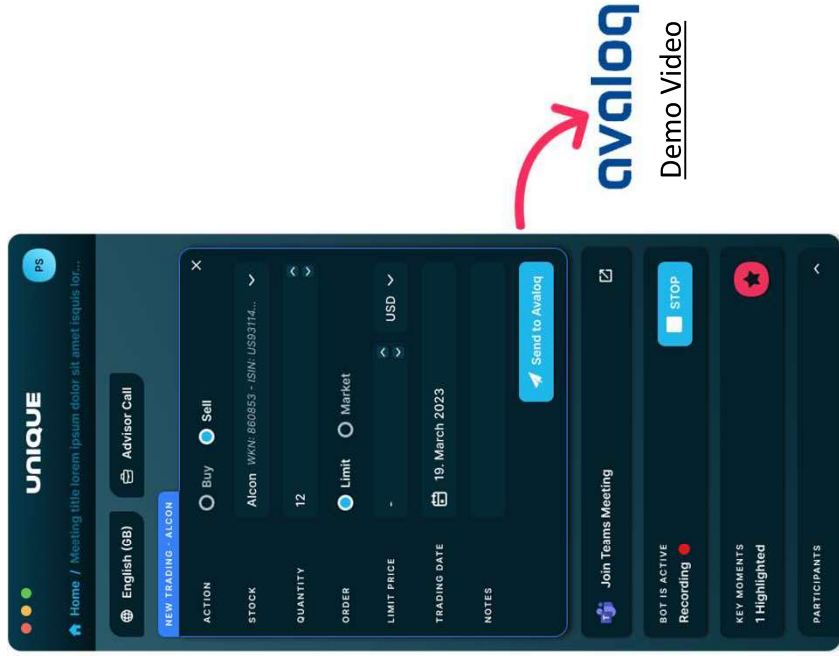
1

Instant client contact summary



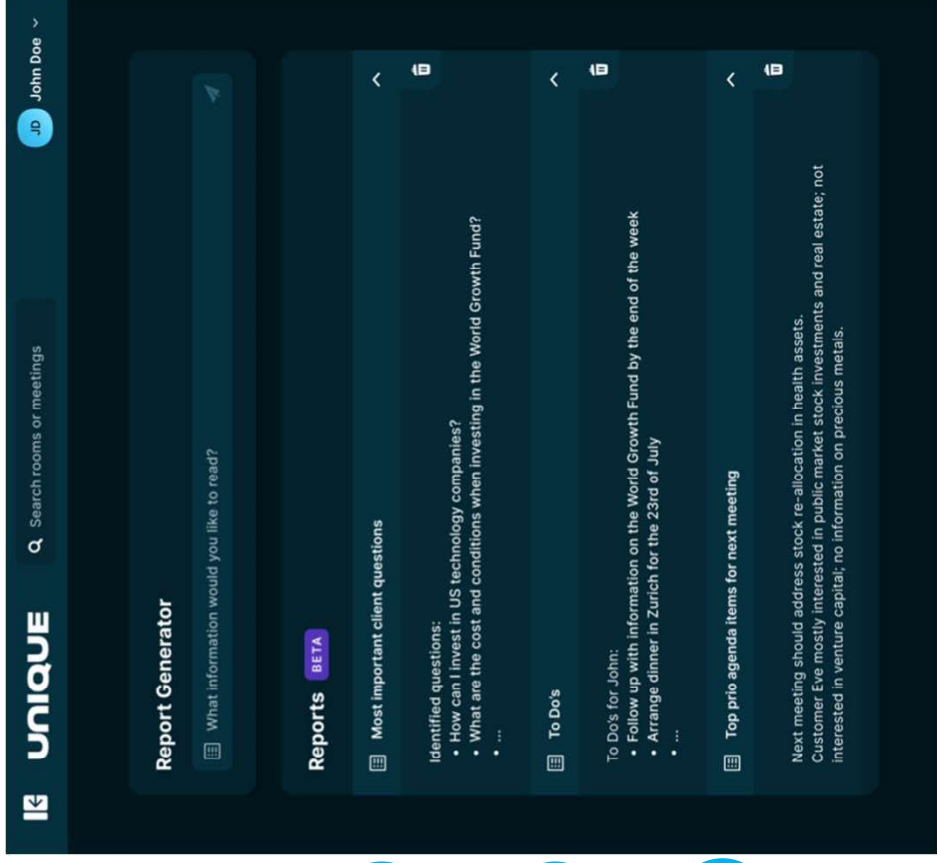
2

Real-time stock transaction identification



After the meeting: Leveraging GPT-3 to capture insights

Mockup Data



1

2

3

After the meeting: Leveraging GPT-3 to capture insights

1. To the Point: Summaries by Topics

- What were the most important **questions** the client asked?
- What questions were unanswered?

2. List all Transactions and related Advice

- Provide a **list of all agreed transactions** and my advice for each

3. What next: To-Do Extraction

- What are the specific to-do's for the relationship manager?
- What **timeline** was agreed on?

4. Who we're dealing with: Client Insights

- For the **next meeting**, what will be the most important aspects to address with the client?
- Which **top 3 asset classes** did the customer show interest in?

5. Automatic Follow-up Emails

Some last hints when working with ChatGPT

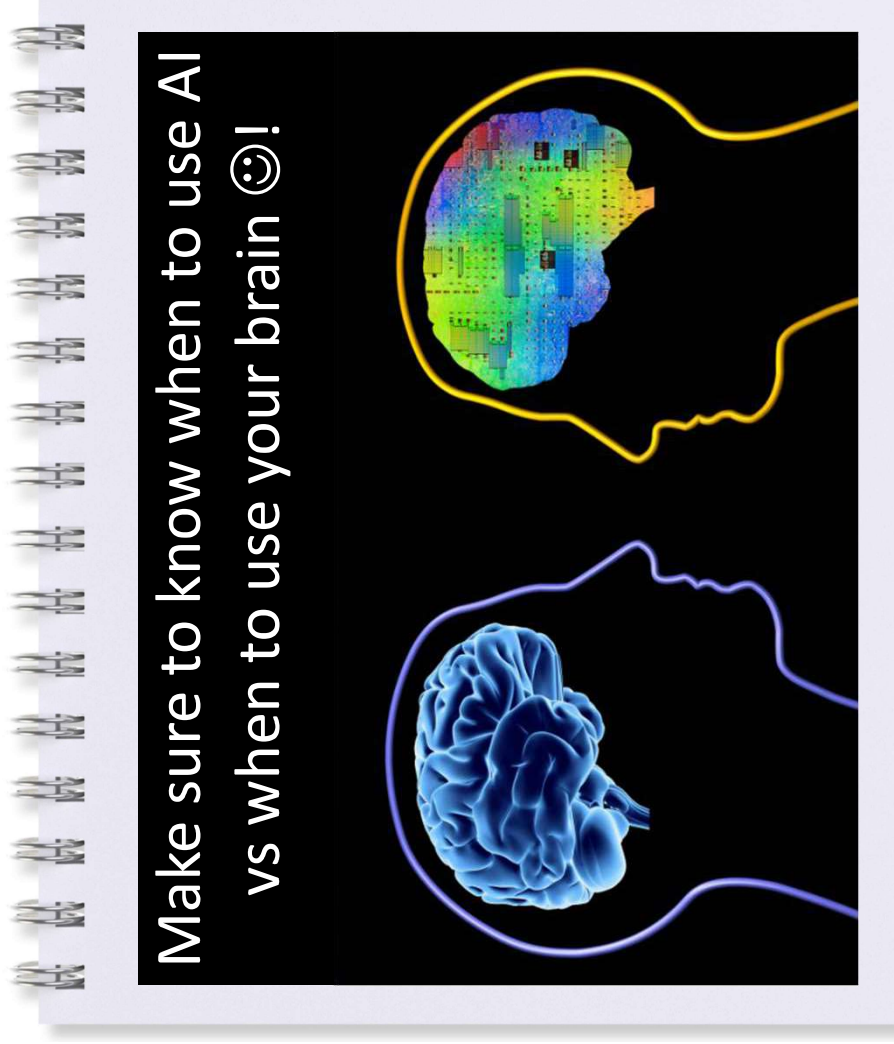
Prompting

- (1) **Be specific** – the more context you give, the better answers you get
- (2) **Don't paste sensitive or personal data in ChatGPT** (also, no company IP data)
- (3) **Don't use harmful or inappropriate prompts**
- (4) Use the **chat function** to iterate ideas / answers
- (5) Check the output for **factual accuracy** (hallucination of the model might sometimes give plausible but wrong answers)

General

- (1) If you want to use ChatGPT in an enterprise setup, **work with the API** and make use of the opt-out functions
- (2) ChatGPT is **trained until 2021** – if you also want to use current information, use other tools (e.g. Bing, also OpenAI works on internet connection)
- (3) ChatGPT is **bad at computation and logic** – better LLMs are emerging (e.g. Wolfram | Alpha)

Summary and final thought



Thank you for your attention!

Let's join forces for OpenAI/ChatGPT – get in touch!

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